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MUSIC USA 87

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American Music Conference

1987 Review of the Music Industry and Adult Attitudes Toward Music Survey

The American Music Conference, founded in 1947, is a national nonprofit organization dedicated to promoting and encouraging active amateur music participation by people of all ages in the home, school, church and community. Some of AMC's activities on behalf of music include national print and broadcast publicity, radio public service announcements, special publications for parents and music educators, and this annual statistical review of U.S. musical instrument retail sales.

Association members include instrument manufacturers, publishers, wholesalers, retailers, suppliers, accessories manufacturers, trade magazines, and other music industry and music educator associations.

The American Music Conference wishes to acknowledge and thank the National Association of Music Merchants (NAMM) for its generous underwriting of MUSIC USA '87 and the new survey on adult attitudes toward music education and participation which appears in this year's annual review.

ISBN 0-918196-12-4
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303 East Wacker Drive
Suite 1214
Chicago, Illinois 60601
(312) 856-8820

Printed in the U.S.A.

FROM THE PRESIDENT

William McCormick, Jr. is president of AMC and president of Jordan Kitt's Music, Inc., College Park, Maryland.

Nineteen eighty-six was a banner year for the U.S. music industry with manufacturer shipments at retail value exceeding $3.3 billion, up 24 percent over 1985. The 1986 increase was the second largest percentage increase in forty years of AMC's statistical reporting. The last time industry sales figures posted double-digit increases was 1974.

Another "first" for the music industry during 1986 was the fact that exports of American-made musical instruments and parts increased 21 percent to $113 million (FOB value) after a six-year decline. Much of this increase can be attributed to more attractive prices due to the dollar's decline against foreign currencies. Imports of musical instruments into the U.S. continued to surge in 1986, reaching $583 million (FOB value); up 29 percent over 1985. Imports, estimated at a total retail value of $1.7 billion, now account for an estimated 50 percent of the total U.S. market.

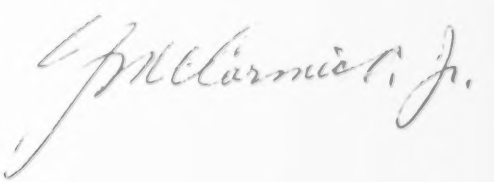
In 1986, as in 1985, shipments of electronic musical instruments—keyboards, guitars, accessories and related equipment—led the total industry by a wide margin. Total shipments of electronic musical instruments exceeded $1.5 billion representing 46 percent of total manufacturer sales at retail value. Leading the electronics segment were portable keyboards, which more than doubled in dollar value and increased more than 90 percent in units due to continued demand from consumers and to expanded retail distribution, especially to non-traditional musical instrument retailers. Keyboard and drum synthesizers showed a nearly 60 percent increase in both units and dollars compared to the previous year.

While electronics led the way in 1986, healthy increases were also recorded in almost all other categories of traditional instruments, printed music and accessories. For the first time since 1978, acoustic pianos rose in units (up 10 percent) while piano dollar sales grew a very strong 29 percent. And, a general trend to growing numbers of student musicians and more purchasing power for school systems was evidenced by rises in both numbers (where reported) and dollars in the band and stringed instrument categories. Acoustic guitar sales also experienced strong growth with more first-time players and young adult purchasers broadening the market.

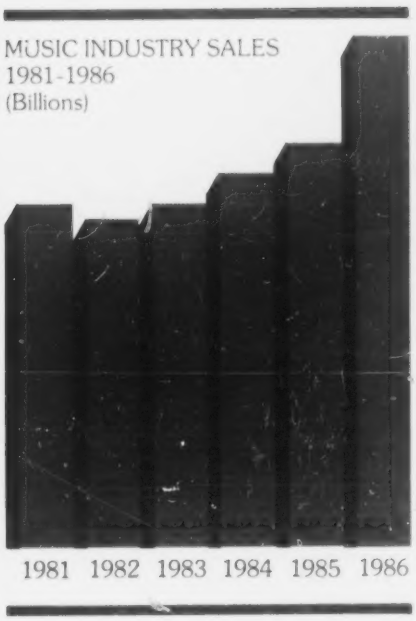
An important addition to this year's edition of MUSIC USA is the results of consumer research on adult attitudes toward music playing and music education. This new research provides potential guidelines for significant messages about the benefits of active music participation that need to be conveyed, as well as perceived barriers that need to be overcome. In some instances, these results may provide new perspectives on the music instrument market. For example, over 60 percent of the adults surveyed believe that instrumental music instruction should be a required subject at the elementary school level. And, about half cited the difficulty of finding a music teacher as a major impediment to a child's learning to play a musical instrument.

A continuing analysis of consumer attitudes toward music participation and education is perhaps equally as important as statistics on consumer purchases in understanding the dynamics of the musical instrument market. In fact, consumer attitudes may be more predictive of future consumer behavior than raw statistics on historical shipments.

The American Music Conference acknowledges with gratitude the financial support of the National Association of Music Merchants (NAMM) for the production of MUSIC USA 1987 and the new adult attitude survey.



1986 RETAIL SALES OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND MUSICAL ACCESSORIES JUMP 24 PERCENT TO $3.4 BILLION



	Music Industry Sales Retail Value	Personal Consumption	% of Personal Consumption[3]	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1986	$3,348,957,000	$2,762.5	0.121%	$4,206.1	328.4
1985	$2,697,900,000[5]	2,582.1	0.104%	3,989.1	322.2
1984	2,496,333,000	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.6	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1959	490,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	438,000,000	281.4	0.156%	441.1	84.3
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1949	220,000,000	176.8	0.124%	256.5	71.4
1941	90,000,000	80.6	0.111%	124.5	44.1

1. *For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music sales. Includes a new category – synthesizers.*
2. *Includes a new category – electric pianos.*
3. *To be read as a fraction of 1%.*
4. *Includes a new category – portable keyboards – plus revised estimates for several categories.*
5. *Figure adjusted to reflect final printed music data from survey results not available at 1985 press time.*

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

How to Read the Data

All units and dollars in this annual review are based on shipments by manufacturers at estimated retail value. Imports, and in some cases exports, are included where noted.

To provide an indicator of actual sales at the music retailer level, this review also includes the results of the National Association of Music Merchants' (NAMM) ongoing survey of music stores around the country.

The total 1986 sales figure of $3.349 billion represents in large part manufacturers' shipments sold through music stores. However, in the past several years, the numbers of different outlets selling musical instruments have increased, particularly with the popularity of electronics. Therefore, in categories where it is appropriate, dollar figures also include estimated sales through mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers by manufacturers, publishers or distributors.

It should be noted that dollar sales estimates in this report, are based on shipments to retailers which may or may not have been sold to consumers each year. The sources of these figures vary widely depending on the availability of a reporting mechanism, the nature of the mix of U.S. made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S Customs Department. In all cases these statistics reflect U.S. Tariff Commission figures as they appear on the import page of this report.

Only two categories in this review are based on an organized but voluntary reporting system, and even within these categories (pianos and organs) estimates have been made for manufacturers who do not report their sales. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, continues to be a particular challenge.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry. A 1986 survey by the National Music Publishers Association was not completed in time for inclusion in this report. (It should also be noted that the 1985 figure for printed music has been revised to reflect results of the NMPA survey which were not available at last year's press time.)

Wind instruments, percussion and string data have been analyzed by industry experts who have tracked both domestic manufacture and imports.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to try to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed strings. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1983, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents three months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

STATISTICAL INFORMATION

Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Sales of pianos during 1986 rose 10 percent in units (the first increase since 1978) while total dollars jumped 29 percent, reaching an all-time high. Grand pianos, which account for nearly half of all dollars in this category, were up more than 40 percent in total value compared to the previous year. According to industry sources, high-priced verticals were strong sellers and grands continued to be popular, especially with young, upwardly mobile adults.

Sales of Pianos

	Units	Dollars[1]
1986	166,555	$619,763
1985	151,300	480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1974	248,405	273,246
1973	247,701	239,179
1972	232,507	208,924
1970	193,814	164,000
1965	245,600	189,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

[1]*In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.

Organs

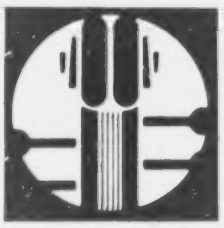
Includes: Domestic production and imports with retail value of $1,000 and up. Exports are not included.

Mid- to higher-priced organs were reported as steady sellers during 1986 as total dollars fell 10 percent and units dropped 19 percent. Compared to the previous year, the average cost per-unit increased by 11 percent. Manufacturer and retailer sources reported a strong market of current owners upgrading to units with more features and continued to note steady sales when the product was actively promoted to consumers.

Sales of Organs

	Units	Dollars[1]
1986	40,000	$140,000
1985	49,600	156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1974	233,845	424,896
1973	202,275	358,836
1972	186,000	314,340
1970	137,500	215,400
1965	143,000	180,600
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1]*In thousands of dollars.*
Source: National Association of Electronic Organ Manufacturers, U.S. Tariff Commission and industry estimates.



String Instruments

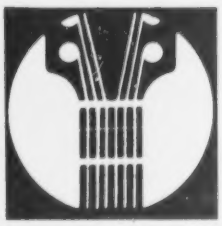
Includes: Imports and domestic production of violins, violas, cellos and basses.

Increased numbers of school orchestral programs (particularly in smaller communities around the U.S.) and more purchasing by school systems were cited as helping push both units and dollars nearly 25 percent ahead of 1985. Cellos and basses were strong sellers. Overall imports were up 25 percent, with larger numbers of high-priced units shipped from Europe and Japan; low-priced units from Mainland China rose nearly 90 percent. Domestic production was reported up nearly 25 percent.

Sales of String Instruments

	Units	Dollars[1]
1986	86,950	$32,029
1985	70,000	26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1974	63,655	19,466
1973	54,866	15,252
1972	61,565	12,559
1970	75,700	19,720
1965	64,000	13,400
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: U.S. Tariff Commission with adjustment made for domestic production.



Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

Total units of fretted instruments were up 6 percent and total dollars rose 11 percent. Industry experts reported a strong market for both higher-priced acoustic and electric instruments among young adults and growing numbers of first-time players. Overall imports rose 9 percent in units and 24 percent in dollars. Domestic production dropped approximately 14 percent in both units and dollars during 1986. However, it should be noted that the majority of U.S. manufacturers reported increased production last year; final total domestic estimates reflect a plant closing and drops in production due to start-ups of new manufacturing facilities.

Sales of Fretted Instruments

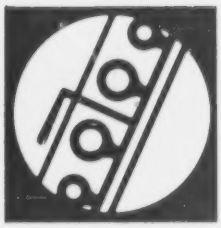
	Units	Dollars[1]
1986	1,121,235	$302,033
1985	1,056,152	271,636
1984	994,607	236,000
1983	875,106	214,500
1982	1,213,138	252,805
1981[2]	1,332,550	320,417
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1970[2]	2,214,686	159,910
1965[2]	1,500,000	140,000
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1] *In thousands of dollars.*
Source: U.S. Tariff Commission and industry estimates.
[2] *These years also include estimates of amplifier and P.A. system sales.*

Sales of Fretted Instruments

	1986		1985		1984	
Domestic	**Units**	**Dollars**	**Units**	**Dollars**	**Units**	**Dollars**
Includes Non-electric guitars, Electric guitars and other fretted inst.[1]						
Domestic Total ($ rounded)	117,470	$ 79,774,000	138,200	$ 92,761,000	131,000	$ 81,000,000
Imports						
Non-electric guitars	492,764	$ 73,554,000	440,253	$ 57,900,000	495,535	$ 66,000,000
Electric guitars	405,965	136,979,000	373,339	112,700,000	285,262	81,000,000
Other fretted[2]	105,036	11,726,000	104,360	8,275,000	82,810	8,000,000
Import Total ($ rounded)	1,003,765	$222,259,000	917,952	$178,875,000	863,607	$155,000,000
Grand Total ($ rounded)	1,121,235	$302,033,000	1,056,152	$271,636,000	994,607	$236,000,000

[1] *Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.*
[2] *Includes banjos, ukuleles and mandolins.*

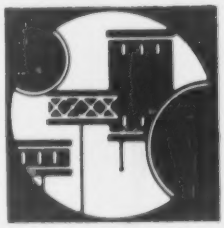


Woodwind Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.

Brass Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.



Percussion

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

Woodwind instruments increased 5 percent in units and 11 percent in dollars. Domestic manufacturers reported increased production and imported units rose 8 percent over 1985. Alto saxophone and clarinet sales were strong; flutes were stable. Brass instruments dropped 4 percent in units and were up slightly in dollars, reflecting in part higher-priced units from Germany and Japan. Overall, brass imports were up approximately 3 percent and domestic units were down slightly from the previous year.

Sales of percussion instruments rose 8 percent in 1986 reaching an all-time high for this category. Factors contributing to the increase, according to industry sources, included more first-time players, increased numbers of marching bands and stable school band programs. Imports, which make up the majority of this category, jumped nearly 50 percent in value over the previous year.

Sales of Band Instruments
A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars[1]
1986	326,500	$158,000
1985	309,800	141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	353,000	85,073
1972	329,207	76,972
1970	304,000	66,150
1965	322,000	61,000
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

Sales of Band Instruments
B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

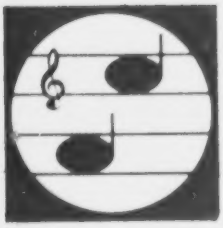
	Units	Dollars[1]
1986	139,500	$69,150
1985	144,600	67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1974	267,360	71,118
1973	254,000	63,754
1972	219,800	53,666
1970	225,000	51,000
1965	230,000	44,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

[1]*In thousands of dollars. Source: Industry estimates*

Sales of Drums

	Units	Dollars[1]
1986	NA	$90,000
1985	NA	83,000
1984	NA	82,000
1983	NA	78,000
1982	NA	78,475
1981	NA	82,914
1980	NA	69,017
1979	NA	70,426
1978	NA	61,240
1977	NA	56,700
1976	NA	53,000
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,856
1970	NA	32,000
1965	NA	50,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars*
Source: Industry estimates
Unit figures unavailable since drums sold in sets



Printed Music

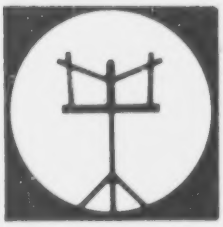
Includes: Domestic publishing of sheet music and self-instruction aids.

Stable educational music programs and growing demand for electronic keyboard music helped bring up total dollars by 5 percent in 1986. (It should be noted that the 1985 total dollar figure has been adjusted upward by $3 million to reflect final results of the annual survey of members of the National Music Publishers. Church Music Publishers and Music Publishers associations not available at MUSIC USA press time last year.)

Sales of Printed Music

	Dollars[1]
1986	$290,000
1985	275,000[2]
1984	266,800
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1970	91,500
1967	72,000

[1]In thousands of dollars. 1981–1983 data from a new survey sponsored by National Music Publishers' Assoc., Church Music Publishers' Assoc., and Music Publishers' Assoc. of the U.S.
[2]Figure adjusted upward from $272 million to reflect final data from survey of NMPA, MPA, and CMPA members not available at 1985 press time.



Accessories

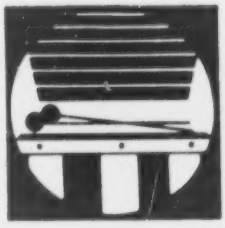
Includes: Estimates for sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Solid increases in all types of accessories sales during 1986 contributed to a 9 percent growth. Guitar strings (the largest dollar segment) were up 8 percent due to continued consumer interest in guitar playing, reported industry experts. Electronic accessories and instrument stands registered the greatest increases, up 12 and 11 percent respectively.

Sales of Accessories

	Dollars[1]
1986	$226,000
1985	208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1974	183,474
1973	152,895
1972	132,953
1970	108,400
1967	85,000

[1]In thousands of dollars.
Source: Industry estimates.
[2]Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.



Miscellaneous Other Instruments

Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Total dollars for this category (including 19 different types of imported instruments) were up 7 percent. Drums, cymbals and other percussion instruments rose 30 percent, while electronic instruments dropped 38 percent in value reflecting substantial decreases in hand-held keyboards and organs valued under $400. Percussion and electronics, combined, accounted for 63 percent of all dollars in this category, compared to 67 percent in 1985.

Sales of Miscellaneous Other Instruments

	Dollars[1]
1986	$226,954
1985	211,161
1984	166,000
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,887
1974	106,628
1973	107,072
1972	92,146
1970	78,509
1967	53,800

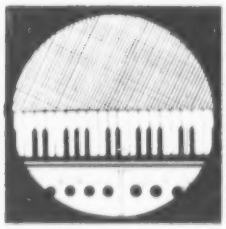
[1]In thousands of dollars.
Source: U.S. Tariff Commission.
[2]Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.

Electronics Account For Nearly Half Of Total Industry Sales; Keyboard Is King

Total estimated retail value of manufacturers' shipments of electronic keyboards, guitars, accessories and related equipment were nearly $1.553 billion in 1986. That figure, representing 46 percent of all instrument and instrument-related sales in the U.S., was up by more than one-third over 1985.

Electronic keyboards and related electronic equipment jumped more than 40 percent (compared to 1985) to approximately $1.335 billion. Electric guitars and electronic equipment accounted for another $218 million.

While the categories in U.S. Tariff Commission data continue to provide a confusing picture of the exact type of keyboards imported, total estimated retail value for these instruments accounted for 50 percent of all electronics sales during 1986.



Portable Keyboards

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

With the introduction of new, inexpensive voice sampling products and large numbers of first-time buyers entering the market, both units and dollars more than doubled in 1986. Industry sources also reported continued expansion of distribution outlets such as department stores, major audio chains, warehouse clubs, catalog showrooms and home video shopping services.

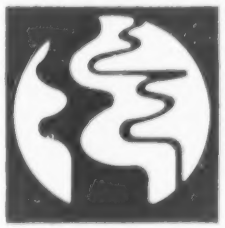
Sales of keyboards retailing for an average unit price of over $300 (generally sold through MI dealers) jumped 140 percent in units and 165 percent in dollars compared to the previous year. Under $300 per-unit volume (through other types of retailers) was up 78 percent in units and 72 percent in dollars.

	Units	Value
Under $300:	1,800,000	$268,200,000
Over $300:	700,000	258,300,000
Total:	2,500,000	$526,500,000

Portable Keyboards

	Units	Dollars[1]
1986	2,500,000	$526,500
1985	1,300,500	253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53,900[2]
1980	NA	7,586[3]

[1] *In thousands of dollars*
[2] *Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981*
[3] *Included in Miscellaneous Other Instruments in 1980*



Synthesizers

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers.

Increased numbers of first-time purchasers and sales of add-on units for existing systems brought both units and dollars up nearly 60 percent in 1986, according to industry sources. Digital sampling and built-in signal processing also attracted more purchasers. Drum synthesizers were up 50 percent in units, with average per unit cost down 22 percent from the previous year. More than 90 percent of all units in this category are imported.

Sales of Synthesizers

	Units	Dollars[1]
1986	350,500	$275,000
1985	220,000	173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1] *In thousands of dollars*
[2] *First year for inclusion of this category. Source: Industry estimates*

Electric Pianos/ Electronic Keyboards

Includes: Domestic production, imports and exports.

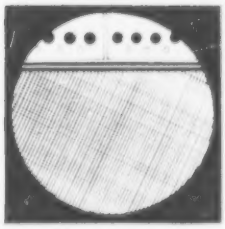
Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

Technological advances which brought down prices in 1986, contributed to the 40 percent increase in units and 29 percent rise in dollars, according to industry experts. Piano-like touch and tone were reported as major selling points with purchasers who tended to represent young, apartment-dwelling families. U.S. government classifications continue to make it difficult to determine how many imports fall into the "piano" segment. Overall, however, imports account for nearly 90 percent of this category's total units.

Sales of Electric Pianos/ Electronic Keyboards

	Units	Dollars[1]
1986	84,000	$134,400
1985	60,000	107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates.*



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

Increased interest in guitar playing was the major factor cited by industry sources for amplifier sales rising 11 percent in units and 7 percent in dollars. Strongest sellers were low-priced, small portable units with high-performance features.

Continued popularity of home recording boosted P.A. systems and components by 6 percent. Mixers and signal processing equipment (accounting for nearly 35 percent of the total P.A. system and component dollars) were up 10 percent in 1986.

Sales of Amplifiers

	Units	Dollars[1]
1986	188,700	$55,228
1985	170,000	51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245
1971[2]	96,000	35,643

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

Sales of P.A. Systems and Components

(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Units	Dollars[1]
1986	NA	$203,900
1985	NA	192,000
1984	NA	181,000
1983	NA	171,000
1982	NA	157,500
1981	NA	175,000[3]
1980	NA	121,000[4]
1979	NA	121,000
1978	NA	108,000
1977	NA	100,000
1976	NA	60,000
1975	71,000	53,000
1974	60,000	45,000
1973	18,900	11,246
1972	18,000	10,318
1971[2]	16,000	9,903

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*
[3]*Includes $18 million of electronic devices previously included in the "Accessories" category.*
[4]*Low estimate according to industry sources.*

1986 EXPORTS END SIX-YEAR DECLINE, SHOW 21% GAIN; IMPORTS REACH HIGHEST MARK

U.S. exports of musical instruments, parts and accessories, in decline since 1980, last year made an upward swing in value of 21 percent over 1985 figures, according to the American Music Conference's (AMC) annual analysis of U.S. Department of Commerce data. Imports again were up, showing a 30 percent increase over the previous year.

Exports, valued at $112.5 million in 1986, had averaged a 15 percent yearly decline for the last six years since peaking at $210.9 million in 1980.

Last year's 21 percent rise is a welcome change for American instrument manufacturers who in 1985 saw the total dollar value of exports sink to its lowest point since 1973. Industry experts attribute the 1986 increase to more attractive prices due to the dollar's decline against foreign currencies.

Imports reached their highest dollar value ever at $583.3 million in 1986, continuing a six-year growth trend. Strong gains in electronic keyboards and synthesizers, along with steady increases in most other instrument categories, contributed to the 30 percent rise in total value.

Exports

Every category of exported musical instruments showed an increase either in units shipped or total dollar value. Nine of the 14 export categories overall showed gains in value and (where figures were available) in units compared with only two the previous year.

U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1986 Units	1986 Value	1985 Units	1985 Value	1984 Units	1984 Value	1986 Leading Sources
Pianos	70,746	$116,446,770	56,822	$94,333,453	46,262	$79,514,516	Japan/Korea
Violins, Violas, Cellos, Basses	87,423	6,027,529	68,419	4,193,493	94,642	5,260,592	West Germany/Japan
Guitars, Nonamplified	492,764	18,388,482	440,253	14,474,467	495,535	15,549,506	Korea/Taiwan/Japan
Other Stringed Musical Instruments[1]	105,036	2,931,464	104,360	2,068,772	82,810	1,942,563	Taiwan/Korea
Strings for Musical Instruments	N/A	3,472,327	N/A	2,582,214	N/A	2,920,883	United Kingdom/ West Germany
Pipe Organs	135	6,915,917	144	6,022,738	84	3,449,560	Canada
Organs (Except Pipe & Electric)	65,332	1,850,465	77,830	2,047,275	117,786	2,470,479	Italy
Accordions, Concertinas	7,434	1,509,815	10,130	1,521,769	7,763	1,465,810	West Germany/Italy
Mouth Organs[2]	179,011	3,683,776	220,252	1,945,185	129,049	2,021,238	West Germany
Brasswind Musical Instruments[3]	27,360	7,927,273	26,647	5,257,468	24,131	4,975,168	Japan
Clarinets	20,606	4,055,033	28,452	3,672,809	14,744	2,380,517	France/West Germany
Saxophones	24,668	7,209,563	18,171	4,916,580	18,450	4,645,230	Japan/Taiwan
Other Wind Instruments[4]	870,319	5,754,275	781,295	4,917,054	710,994	4,455,971	Japan
Percussion Musical Instruments[5]	N/A	25,393,613	N/A	19,470,202	N/A	16,144,189	Japan/Taiwan
Electronic Organs[6] (Two Keyboards)	11,560	4,638,806	24,079	11,664,688	45,578	8,509,512	Japan/Italy
Electronic Keyboards (One Keyboard)	1,930,390	159,357,868	1,331,042	98,825,359	534,203	48,386,765	Japan
Music Synthesizers (With Keyboards)	261,181	61,734,398	176,787	40,752,578	75,672	22,832,601	Japan
Other Electronic Musical Instruments[7]	107,170	12,861,602	217,347	21,579,862	112,995	13,695,663	Japan
Hand Held Electronic Instruments	40,132	1,208,322	171,052	6,985,478	56,639	1,645,978	Japan
Electronic Fretted Instruments	405,965	34,244,632	373,339	28,176,067	285,262	19,011,480	Japan/Korea
Accessories[8]	N/A	30,584,815	N/A	20,996,434	N/A	19,449,686	Japan/Taiwan
Parts for Musical Instruments	N/A	63,048,745	N/A	49,745,334	N/A	50,976,087	West Germany/Mexico/ Japan
Harpsichords and Clavichords	6,876	4,110,855	14,004	4,145,360	4,687	2,471,519	Japan/Korea
TOTALS		$583,356,345		$450,294,619		$334,175,513	

Source: U.S. Department of Commerce, Bureau of Census, Foreign Trade Division. [1]*Includes banjos, ukuleles and other fretted instruments.* [2]*All totals are in dozens.* [3]*Over $10 in value.* [4]*Includes flutes, oboes, English horns, etc.* [5]*Includes cymbals, drums, marimbas, triangles, etc.* [6]*Keyboard instruments with more than one keyboard.* [7]*Includes any instrument that requires amplification, such as drum and rhythm machines.* [8]*Includes mutes, accessories for drums and cymbals, lyres, music stands, cases for instruments, metronomes, pitch pipes, tuning forks and tuning hammers.*

Exports of all electronic instruments were up a total of 43 percent to just less than $40 million. The synthesizer/electric piano category, consistently strong in growth, led all categories (expect the general "other musical instruments") with a 113 percent dollar value surge to $3.3 million and a 76 percent rise in units. Electric guitars followed with a 112 percent growth to $4.2 million and more than doubled in units to 15,663.

Brasswinds, reported at $9.8 million, topped the traditional instrument export categories in total dollar value for the second year in a row (up 20 percent) and registered a 14 percent gain in units after slipping for the past three years. Percussion instruments, the other consistently large traditional instrument exports, were up 13 percent in value last year, after 1985's 30 percent drop.

Both acoustic pianos and electronic organs showed little growth in 1986. Pianos were d[illegible] percent in units but up 1 percent in value to $4.8 million; electronic organs posted a 6 percent unit growth, but declined 39 percent in value due to an average drop of $178 per unit.

The only other export category showing a decline was woodwinds, with a 25 percent drop in units, though it ended the year up 3 percent in dollar value; this reflects a rise in the average cost per unit from $111 in 1985 to $152 last year.

Acoustic guitars rose 74 percent to 12,764 units and increased 50 percent in value to $3.9 million. "Other plucked/bowed strings"—including harps, clavichords and mandolins—were up 25 percent in units and 26 percent in value.

Imports

Leading all instrument imports in total dollar value for the second consecutive year, the electronic keyboard category, at $159.4 million, was up 61 percent in 1986. Of the 1.9 million units imported (a 45 percent increase over 1985), 96 percent came from Japan with an average per unit value of $81, compared to $72 the previous year.

Electric guitars have risen markedly from a low of 135,632 units in 1982 to 405,965 in 1986, a nine percent unit increase over 1985. The total

(continued on page 17)

1986 U.S. EXPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1986 Units	1986 Value	1985 Units	1985 Value	1984 Units	1984 Value	1986 Leading Customers
Pianos	3,455	$4,832,603	3,813	$ 4,761,742	5,659	$ 6,194,404	Canada
Guitars	12,764	3,887,866	7,332	2,595,527	10,640	3,236,643	Japan
Electric Guitars	15,663	4,202,302	7,614	1,977,966	19,905	4,216,426	Japan/United Kingdom
Other Plucked and Bowed Strings[1]	51,255	3,623,425	40,945	2,877,401	19,925	1,798,596	Japan
Electronic Organs	4,878	5,550,991	4,585	6,033,382	7,092	7,673,145	Canada
Synthesizers and Electric Pianos	4,107	3,316,720	2,330	1,554,789	1,923	1,332,300	Holland/Germany
Other Electronic Musical Instruments	N/A	26,886,507	N/A	18,367,402	N/A	16,422,772	United Kingdom/Japan
Brasswinds	30,703	9,800,039	26,958	8,134,660	33,702	9,541,620	Japan/Germany
Woodwinds	25,920	3,945,339	34,365	3,822,326	42,184	4,501,407	Canada
Percussion Instruments	N/A	7,696,202	N/A	6,780,944	N/A	9,696,985	Japan
Organs, Pipe & Reed	88	102,668	87	167,564	44	255,178	Brazil
Piano and Organ Parts	N/A	4,472,375	N/A	6,560,569	N/A	10,304,151	Mexico
Other Parts, Cases and Accessories	N/A	33,258,117	N/A	28,902,709	N/A	28,545,310	Japan
Other Musical Instruments[2]	22,975	938,329	5,822	337,879	8,053	503,753	Holland
TOTALS		$112,513,483		$92,874,860		$104,222,702	

[1]*Includes harps, clavichords, mandolins.* [2]*Includes mouth organs, accordions.*

NAMM RETAILER SURVEY PARTICIPANTS REPORT 8 PERCENT INCREASE DURING 1986

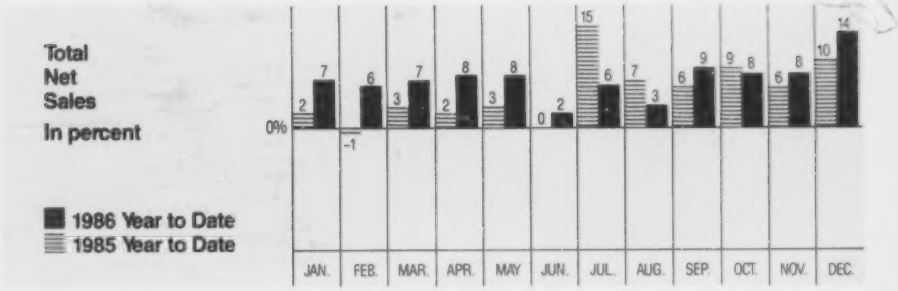
During 1986, overall retail sales of musical instruments, sheet music and accessories increased eight percent compared to the previous year, as reported by retailers around the U.S. who participate in the National Association of Music Merchants' (NAMM) ongoing survey. Data is analyzed monthly by Industry Insights, Inc., of Columbus, Ohio.

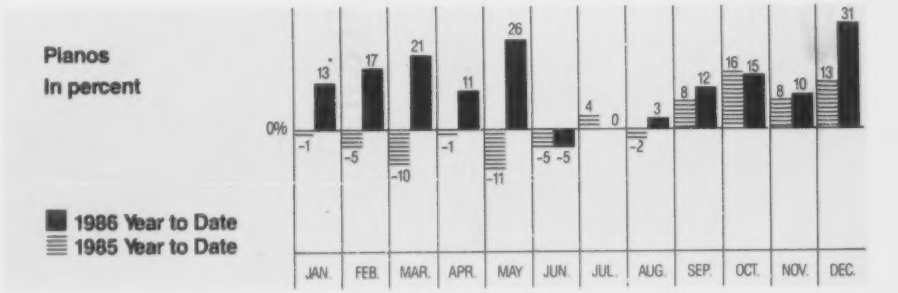
Sales of pianos during 1986 were up an estimated 14 percent; organs were down slightly by one percent.

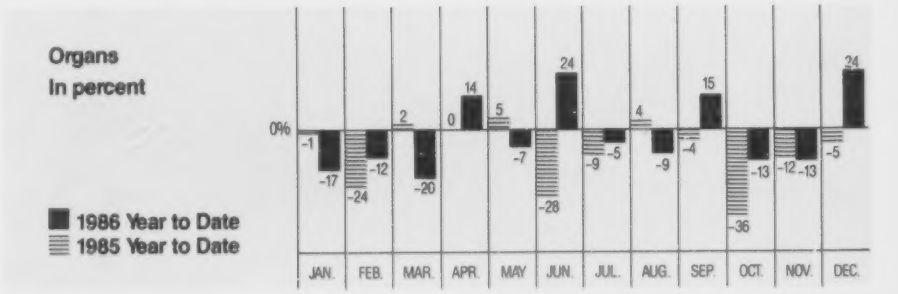
Band and orchestra instruments increased six percent: percussion dropped by eight percent, and fretted instruments were five percent ahead of 1985. Sheet music sales were reported 10 percent up and accessories increased 9 percent.

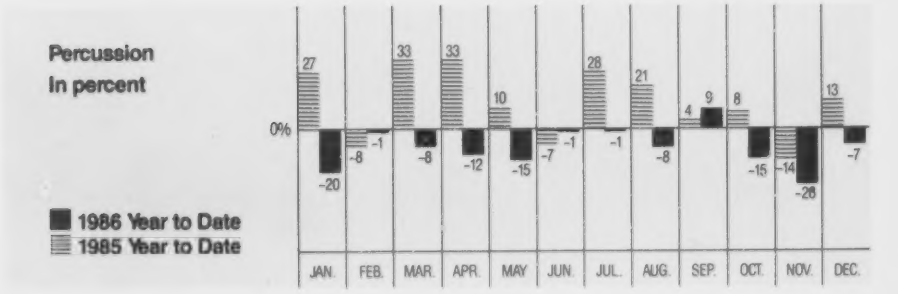
Electronic keyboards jumped 23 percent; instrument amplifiers increased by 3 percent, and sound reinforcement equipment was up 12 percent. The signal processing and effects devices category did not produce enough responses for inclusion in the survey.

Also, the 8 percent increase in total net sales for 1986 included data for recording equipment not shown by a separate chart.



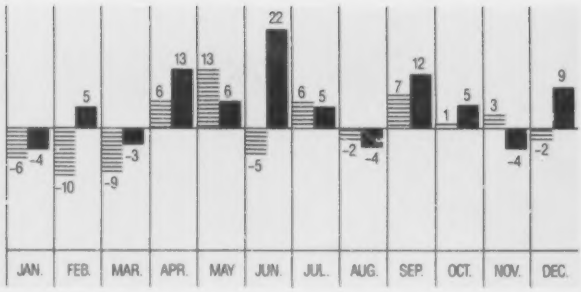




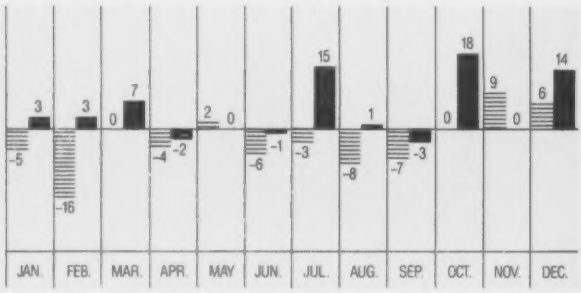


How to Read The Charts: On each of the following charts, 1986 total net sales are compared to sales during the same period in 1985 for respondents to the monthly survey. The base line (0 percent) represents 1982 sales.

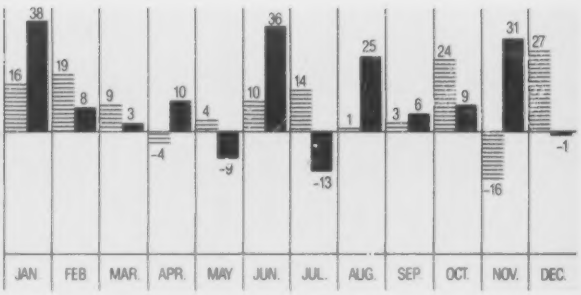
Band and Orchestra Instruments
In percent



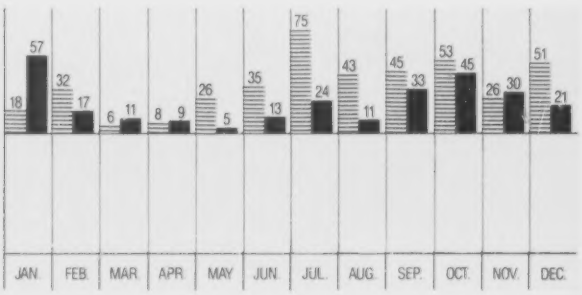
Fretted Instruments
In percent



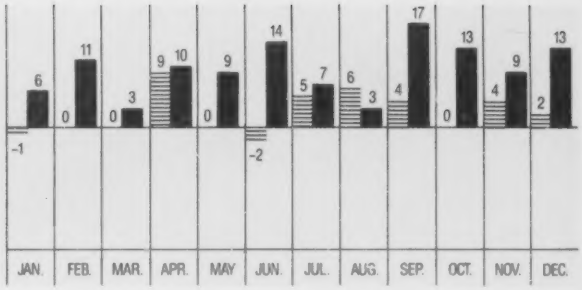
Sound Reinforcement Equipment
In percent



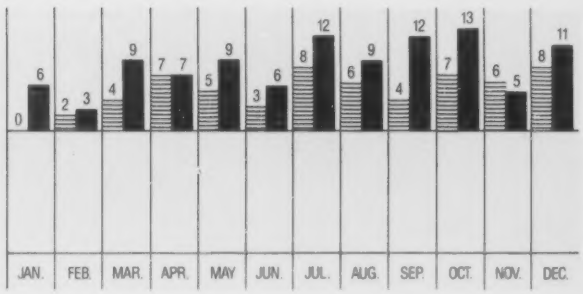
Electronic Keyboards
In percent



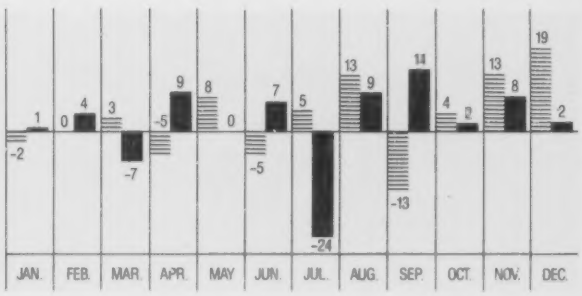
Sheet Music
In percent



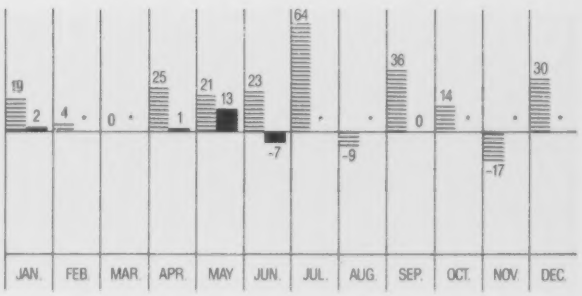
Accessories
In percent



Instrument Amplifiers
In percent



Signal Processing and Effects Devices
In percent



[1]For further information about these charts, contact the National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008. Note that dollar information has not been adjusted for inflation.

NEW SURVEY FINDS AMERICAN ADULTS POSITIVE TOWARD MUSIC PARTICIPATION, EDUCATION; PROFILES THE 'TYPICAL' MUSICAL HOUSEHOLD

Adults in the U.S. today tend to have very positive and enthusiastic attitudes toward playing musical instruments and taking music lessons, according to a new American Music Conference study. Ninety-one percent of the adults surveyed agree that learning to play a musical instrument is something "you'll always be glad you learned to do." And, over 60 percent of them believe that instrumental music instruction should be a required subject at the elementary school level.

These, and other insights into adults' attitudes about instrumental music participation and education, were revealed by the survey which was underwritten by the National Association of Music Merchants (NAMM) and conducted by Market Facts, Inc.

The survey, which polled 1,565 married men and women (60 percent of whom have children), also helped to identify some of the perceptions these adults have regarding the benefits of, as well as barriers to, active instrumental music-making.

Another purpose of the survey was to develop a profile of the "typical" American musical household. (Musical households are defined as those in which someone currently plays an instrument; non-musical households as those in which no one currently plays.) This lifestyle analysis focused on the differences between musical and non-musical households in terms of their attitudes and interests, activities, media habits and demographics.

ADULTS' ATTITUDES TOWARD MUSIC[1]
(Players and Non-Players)

	Agree	Disagree
Playing an instrument is something you'll always be glad you learned to do.	91%	9%
Music is a very important part of my life.	71	29
I wish I had learned to play an instrument.	76	24
I would like to learn to play an instrument.	65	35
It's hard to learn to play an instrument.	52	48
I'm too old to learn to play an instrument.	32	68

[1]Percentages based on responses from total survey respondents; 1,565 married men and women.

Attitudes Toward Adult Music Participation

Nearly three-fourths of the adults responding to the survey said that music is an important part of their lives, whether or not they currently play an instrument. Nine out of ten of these people voiced positive attitudes toward instrumental music participation by agreeing with the statement that "playing a musical instrument is something you'll always be glad you learned to do."

Even more telling was the fact that 75 percent of the adults in non-playing households wished they had learned to play an instrument. While half of these respondents felt that learning to play is difficult, 65 percent would like to learn and less than one-third of them felt they were "too old to learn."

The top three reasons adults cited for playing an instrument were that:

- It's fun
- It's relaxing
- And, it helps relieve stress.

Benefits and Barriers To Children's Involvement

How do adults view the role of instrumental music in a child's life? Eighty-five percent of the survey participants agree that every child should be exposed to learning to play a musical instrument. And, 83 percent agreed that schools should offer instrumental music instruction as part of the regular curriculum. They also believed that communities should provide financial support for music education programs in their schools.

The most important reasons for a child learning to play an instrument, according to adults in both playing and non-playing households, involved "internal" or personal kinds of growth:

- Playing is an activity a child can enjoy all of his or her life
- It provides a sense of accomplishment
- It's fun

Among all adults, the main barrier to a child's learning an instrument is that it's too hard to get children to practice, as cited by 67 percent of all respondents. Barriers more often cited by non-musical (as compared to musical) households were that learning is too expensive and also that most children will lose interest and quit. Approximately half of both musical and non-musical households also cited the difficulty of finding a music teacher as an impediment to a child's learning to play.

Whose children are the most likely to play musical instruments? Survey results support the idea that exposure to instrumental music in the home has influence on a child. Adults who currently play instruments are the most likely to have musically-involved children. However, nearly 20 percent of children with non-playing parents play an instrument. This suggests that motivators outside of the home can also influence childhood music involvement.

The "Typical" American Musical Household

Several new insights into the "typical" American musical household also emerged from the study results.

Adults in music-playng households (compared to others in homes where no one currently plays an instrument) lead active, well-rounded lives characterized by participation in a variety of community, social, recreational and physical activities.

BARRIERS TO A CHILD LEARNING TO PLAY A MUSICAL INSTRUMENT

	% Agree		
	Total	Adults in Musical Households	Adults in Other Households
It's too hard to get children to practice.	67%	63%	70%
Most kids will just lose interest and quit anyway.	48	39	55
It's hard to find a good music teacher.	48	50	46
The field of music is too competitive.	47	45	49
It's too expensive to learn to play a musical instrument.	40	36	43

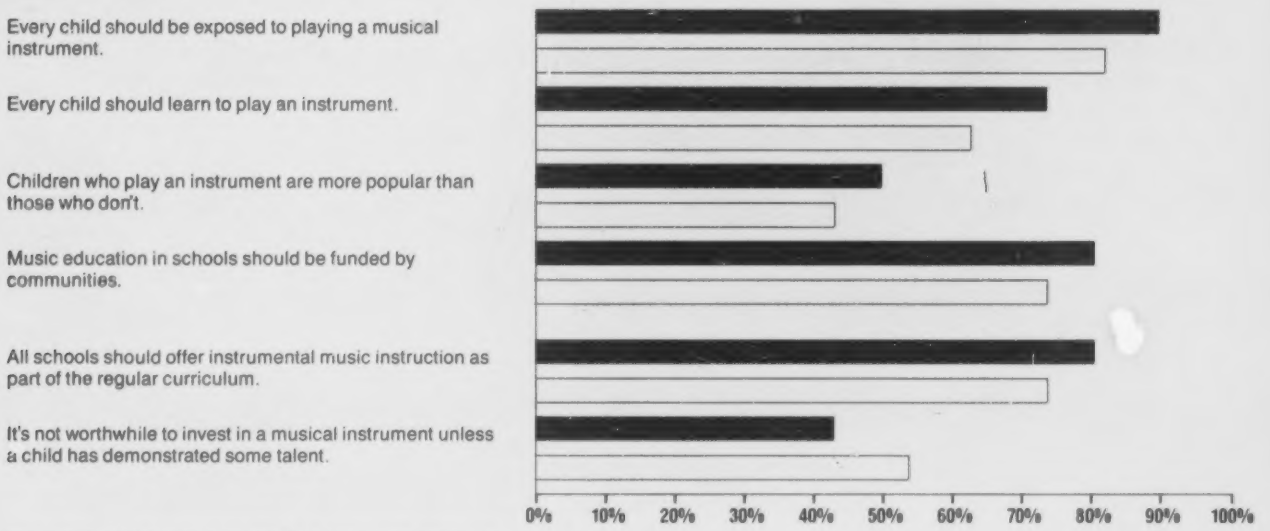
Their greater interest in music appears to be part of a more general interest in learning and intellectual stimulation; they are more likely than others to participate in educational and cultural activities.

But, in terms of their lifestyles and attitudes, men and women in musically-active housholds are not purely sedentary intellectuals. They tend to be:

- Opinion leaders who are active and influential in their communities.
- Busy and feel a bit more pressured, but on the whole appear to be satisfied with, and optimistic about, their lives.
- Less tied to their homes and televisions for entertainment and more likely than others to attend movies, sporting events, amusement parks and other recreational pursuits outside of the home.
- More physically active and more likely to have participated in a variety of out-

ADULT ATTITUDES TOWARD MUSIC AND CHILDREN[1]

■ = Active Musical Households[2]
□ = Other Households[3]


Every child should be exposed to playing a musical instrument.
Every child should learn to play an instrument.
Children who play an instrument are more popular than those who don't.
Music education in schools should be funded by communities.
All schools should offer instrumental music instruction as part of the regular curriculum.
It's not worthwhile to invest in a musical instrument unless a child has demonstrated some talent.
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

[1]*Percentage of total survey respondents who agree with statements.*

[2]*Households where at least one family member currently plays an instrument.*

[3]*Households where someone no longer plays instrument, or where no one has ever learned to play.*

door activities in the past year, including swimming, jogging, bicycling, or walking for exercise.

While their media habits do not differ significantly from adults in non-musical households, they are:

- More likely to read news magazines.
- More likely to include Public Broadcasting (PBS) programming in their television viewing habits.
- Less likely to view daytime soap operas and game shows or nighttime family dramas and certain situation comedies.

Demographically, survey respondents from households where someone currently plays an instrument tend to be in the 35- to 54-year-old age group, have school-age children, are well-educated and part of a two-career family with a higher income. There has been no significant change in these demographics compared to a 1974 AMC survey conducted by Market Facts.

WHO PLAYS IN MUSICAL HOUSEHOLDS?

Person Who Currently Plays:	Musical Households
Survey Respondent	39%
Spouse	36
Children	54
Other Family Member	3
Two or more household members play	38%
Average Number of Players Per Household	1.5

WHOSE CHILDREN ARE MOST LIKELY TO PLAY MUSICAL INSTRUMENTS?

Respondents Who:[2]	Have Children Who Play
Currently Play an Instrument:	29%
Used to Play But No Longer Do:	21
Have Never Played an Instrument:	18

[2]*Based on total survey sample of 1,565 adults*

(continued from page 11)

value of the category last year rose 22 percent to $34 million, with the average unit value increasing 11 percent to $84.

Hand-held electronic instruments dropped $5.8 million, plummeting 83 percent in value to $1.2 million and 77 percent in units shipped to 40,132. Only four countries contributed to this category in 1986, compared to nine the previous year, and Italy's dollar values and units were both down 98 percent after leading the category in 1985. Electronic organs and "other electronic instruments" showed respective 60 percent and 40 percent declines in dollar values and 52 percent and 51 percent unit drops.

All electronic instrument categories posted a combined 31 percent increase in value, slowing down considerably from 1985's 82 percent rise. Since 1980, all electronic instrument categories have posted a combined 1,194 percent increase in total dollar value.

Pianos

Pianos constitute the second largest import category with a total value of more than $116 million, about 20 percent of all imports. Ten years ago, the total value of all imported instruments was $116 million; just less than 20,000 pianos were imported for a value of nearly $16 million in 1976.

Over the past five years, imports of both verticals and grands have increased sharply. In 1986 there were nearly 45,000 vertical pianos imported (63 percent of the total piano category), with an average value of $950 but a decrease of $79 per unit (ten percent) over the previous year.

In the grand piano category, units imported were up 13 percent to more than 26,000, while the average cost of a grand was $2,850, about a 10 percent increase over 1985.

From a high of more than 700,000 units in 1982, the acoustic guitar category had slipped to 440,253 in 1985. Last year, though, it showed a 12 percent upswing to 492,764 units with a total value of $18.4 million. The average value of an imported acoustic guitar rose 27 percent to just more than $37.

Brasswind instruments rose only three percent in units but the category's dollar value was boosted 51 percent to $7.9 million by a $92 per unit average increase. Similarly clarinets, though down 22 percent in units imported, were up ten percent in value to $4.1 million because of a $58 per unit average rise.

Over the past five years, imports of bowed string instruments have varied widely, ranging from a unit high of nearly 118,000 in 1982 to a low of 68,419 in 1985. Last year, these imports were up to 87,423 units (a 28 percent increase), with the dollar value rising 44 percent to just more than $6 million.

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